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<http://www.opm.gov/rsmloverviewindex.asp>

U.S. Office of Personnel Management

Ensuring the Federal Government has an effective civilian workforce

Retirement Systems Modernization

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General

1. What is Retirement Systems Modernization (RSM)?

Retirement Systems Modernization (RSM) is OPM's strategic initiative to improve the quality and timeliness of services to members of the Civil Service and Federal Employees Retirement Systems by modernizing business processes and the technology that supports them.

2. What are the major components of RSM?

The first major component of RSM is the transformation of paper to electronic record keeping using the Electronic Human Resources Integration (eHRI) data warehouse as the primary source of retirement data. The second main component is the licensing of an existing, proven defined benefits technology from an industry leader to support program administration at OPM and at the HR LOB shared service centers.

3. Why is this modernization necessary?

The workload and complexity of cases is increasing because of the growing number of applicants; this increase has caused us to think differently and turn to modernization. The transformation of the Federal Retirement System is necessary to give Federal employees and annuitants the service they

desire. Federal employees want to take an active role in planning for retirement and they are expecting a higher level of service. Automation is now proven to support retirement process and therefore the selected alternative.

4. What are the benefits of this modernization?

Planning for retirement in advance is an essential element for employees to meet their personal and financial goals. New self-service options and web based tools will be available on-demand for Federal employees to plan early for their retirement. Also, system administrators will have access to Federal employees' and annuitants' information in the system, allowing for enhanced retirement and post-retirement counseling. The automation of claims processing will be done more efficiently, consistently, and provide Federal employees and annuitants access to their retirement information that was not previously available.

5. What are "Self-Service tools"?

Self-service tools allow Federal employees and annuitants to complete tasks online by themselves, rather than depending on others to perform a process for them. This is a win/win situation for both the customers and OPM. It frees up OPM employees to provide a higher level of support to customers by working on things they want help with, and at the same time, allows customers the flexibility to make their own decisions on their own time. It creates a more efficient, effective organization that has long-term and wide-spread benefits.

System

1. How will automation of my documents for the RSM program take place?

Current annuitant data will be converted from the legacy systems into the new system by February 2008, and all processing will be executed in the new system. Annuitants and GSA Shared Service Center employees (including OPM employees) will be able to access their data in the new system following the "go live" conversion. Federal employees' data will be converted through feeds from the Agencies and Shared Service Centers in a series of waves following the February 2008 "go live." In the interim, any retirement applications received in paper form will be scanned into the system and processed electronically. There will be a vigorous testing phase to ensure the accuracy of the data brought over into the new system, as accurate data is a critical element for successful claim processing.

2. When will the RSM program begin implementation?

OPM will begin testing the new environment in the beginning of FY07 and "go-live" in February, 2008.

3. How does RSM differ from today's processes?

RSM seeks to automate 90 percent of retirement claims transactions over time using electronic data that has been transferred from paper records. This automated process will still require manual intervention for more complex cases. In addition, rather than retirement claims transactions being processed through over 100 legacy systems, RSM will consolidate these systems into a more centralized source of data.

Security

1. What steps are being taken to make sure that this new system is secure?

The system will be highly secure from the development phase through "go-live." Information will be secured through certification and accreditation processes. Annuitants and active employees will be provided logon and PINs (Personal Identification Numbers) to access the system. Additionally, we intend to communicate to annuitants and active Federal employees that logon and PIN information are to be kept private, and sharing this information with anyone else unless clearly authorized exposes them to significant risk. It will be made clear in the system that unauthorized people who exploit an annuitant or employee's data are committing identify theft and can be prosecuted by the law enforcement.

My Retirement

1. I am an active or retired Federal employee, how will I receive information concerning my benefits and retirement?

Your Benefits Resource (YBR) is an online resource for you to access your benefits and retirement information. The YBR website will offer the ability to view and select retirement and benefits, for example, to select enrollment, view payment records, and model retirement options.

2. What are the methods available for annuitants and active employees to receive Benefit and Retirement support?

Annuitants and active employees will have multiple channels available to them including a self-service web based tool called Your Benefits Resource (YBR) , speaking to a Customer Support Specialist at OPM via the telephone or visiting their Agency Benefits Office for support and information.

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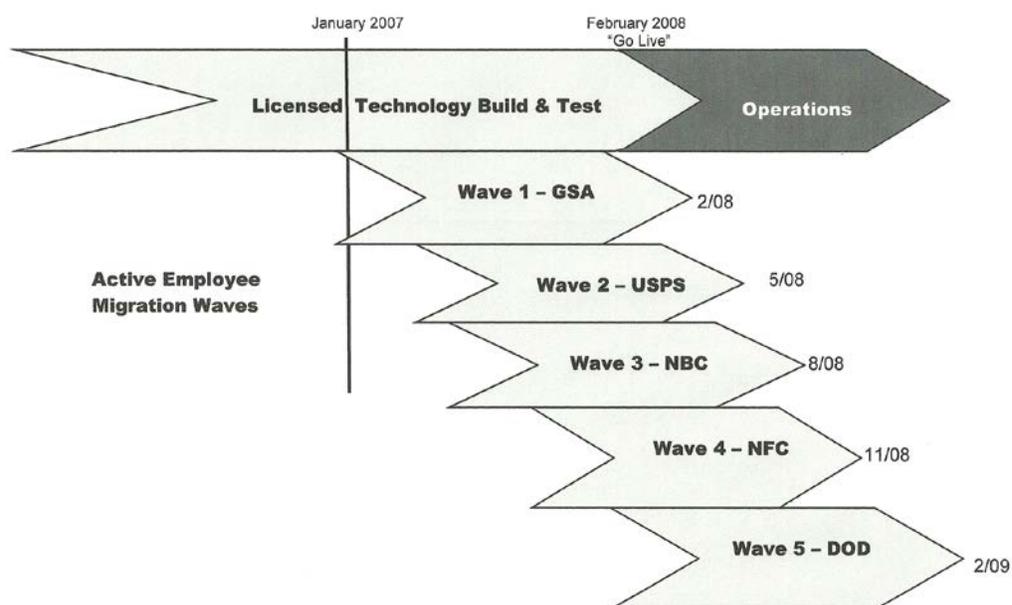
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Overview

RSM Implementation Timeline



Modernizing Federal Retirement Systems requires data to be migrated into the new system in a series of active employee migration waves. As depicted in the image above, following a licensed technology build and test through 2007, all active annuitants and Federal employees under the General Services Administration (GSA) will be able to view their information using Your Benefits Resource (YBR),

the online, self-service tool as of "Go-Live" in February 2008. Following "Go-Live" are four additional active employee migration waves that will gradually bring all active federal employee information into the new retirement system. The order in which the waves will occur will be: General Services Administration (GSA), United States Postal Service (USPS), National Business Center (NBC), National Finance Center (NFC), and finally the Department of Defense (DOD). By 2009, the waves will be complete, and all Federal employees will be able to utilize YBR to model benefits and make retirement plans using online, self service tools.

Migration Wave Key

- Wave 1 – General Services Administration (GSA)
- Wave 2 – United States Postal Service (USPS)
- Wave 3 – National Business Center (NBC)
- Wave 4 – National Finance Center (NFC)
- Wave 5 – Department of defense (DOD)